

TEACHERS' RETIREMENT BOARD

REGULAR MEETING

SUBJECT: Briefing on the Voice of the Customer Project:
Goals, Objectives, Status

ITEM NUMBER: 8

ATTACHMENT(S): 2

ACTION: _____

DATE OF MEETING: December 5, 2002

INFORMATION: X

PRESENTER(S): Kathleen Evans

SUMMARY

The Voice of the Customer Project, funded by the Teachers' Retirement Board as part of the Customer Initiative, is an organization-wide effort to collect, organize and analyze information from CalSTRS' customers about their needs and interests and their level of satisfaction with our services and products. A cross-functional team of CalSTRS managers and analysts is working on the plan to accomplish that goal. The outcome will be an extensive system of surveys, focus groups, and other methods of inquiry with customers that will be executed regularly and give us an evolving picture of what our customers want from us and how well we are doing in their eyes. The system will, in effect, be "the voice of the customer" and will guide decisions and strategies as we work to provide top-notch customer service.

DISCUSSION

The Voice of the Customer system will serve a research and development function for CalSTRS. The foundation of our data collection system will be customer-completed surveys, sent by regular mail or e-mail to a scientifically constructed random sample of customers, meeting specific criteria, depending on the nature of the survey. Surveys will address both satisfaction and importance of specific service and product-related factors and will separately address needs and interests, in terms of new products, services, or program design. Other foundational data collection methods will be focus groups, web-based inquiries, telephone interviews and one-on-one interviews. The data collection methods will be varied and dynamic, changing as new approaches are tried and found to be successful.

The Voice of the Customer team began working on the project last April and has gathered all of the customer requirements, done some benchmarking, and is currently developing a work plan. The team expects to begin working on some small-scale data collection efforts before the beginning of the New Year. The team expects to have the plan in place, and to have tested the major data collection methods by the beginning of next fiscal year. At that point, the system

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will be turned over to Quality and Training Services Division for continuous operation. The Voice of the Customer System is intended to be an integral part of the CalSTRS landscape indefinitely. As CalSTRS grows and changes and we learn more about how to effectively measure customer satisfaction, the system will also evolve and reinvent itself in innovative ways that will keep us close to our customers.

Attached are a copy of the internal business requirements developed by representatives of all of the CalSTRS divisions that interface with our external customers; and a matrix that arrays business requirements by data collection methodology, which will serve as the foundation of the team's work plan.

Voice of the Customer Business Requirements

Release Date:

Version Number: V0.01

Change Control

Author(s)	Change made	Date of Change	Ver-nbr	Approved by/date
Warrick Poyser	Initial version	9-23-02	V0.01	
Suezette van Staden	Updated feedback from Business Areas	10-08-02	V0.01	

Approvals

Business Units (Area)	Business Representative	Date	Section Number
Quality & Training Services	Kathleen Evans Project Manager		
Public Service Office	Cynthia Steiger		Signed off
Health Benefits	Virginia Johnson		Signed off
Office of Program Support Services	Steve Cernicky		Meeting Required
Service Credit Support Unit (Billings)	Steve Cernicky		Signed off
Cash Balance & Voluntary Investment Program	Janine Johnson		Signed off
Accounting	Steve Fagundes Linda Sebastiani		Signed off
Service Retirement	Corey Lockett		Signed off
Public Affairs	Ann Toynbee		Signed off
Disability	Suzanne Connors		Signed off
Client Outreach Program	Susan Adley		Signed off
Survivor Benefits	Sandra Olivo		Signed off
Executive Office	Mary Miles		Signed off
Membership	Sharon Whittington		Signed off
Ombudsman	Tom Barrett		Signed off
CBSB Performance Management	Cora Readye		
RCS	Karen Reed-Tuttle Alice Suitt		Signed off
Financial Education Program	Sue Mosher		Signed off
Audits Program	Way Lee		Complete signoff req
Legislation	Jim Zerio Julian Figgins		Meeting Required

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1 Introduction

The Voice of the Customer (VOTC) system provides CalSTRS with the ability to evaluate the service it provides to its external customers, identify areas for improvement and assist in aligning CalSTRS services to the customers needs and wants.

VOTC will help CalSTRS measure the effect of process improvement and provide greater visibility of customer contact across the organization.

VOTC will centralize, maintain and monitor customer contact and data collected to minimize redundancy and to ensure we are not over-collecting data from the same customers at different times.

Once data is collected VOTC will do trend analysis on the data and provide the results to the different business areas. Each business area may then use these analyses in order to change and improve business processes.

This information obtained will help each business area understand how the customer uses information from other areas of CalSTRS. It will also ensure that individual actions are integrated with the rest of organization and therefore reduce or eliminate duplication of effort within CalSTRS.

The above will be achieved through the use of a cross section of mechanisms, from different levels of surveys for data collection to focus groups to address some of the improvement issues. Each requirement will be addressed by a specific action identified on the Business Requirement Matrix document.

2 Public Service Office (PSO)

Voice of the Customer will help the Public Service Office align performance targets with the customers' wants, needs and expectations while identifying which processes work well and which do not. For example:

- Identify what the customers view as an appropriate service level on phone calls to the call center. Determine what is acceptable to the customer in terms of one, three or five minute wait times, and the relationship of the wait time to the subsequent call length.
- Determine the customer view of terms such as 'courteous behavior', 'responsive' and 'accurate'. What does the customer believe these terms to mean?

Determine whether PSO answers all questions to the satisfaction of customers. Are the answers accurate, complete and consistent?

Identify common reasons for customer contact.

Determine who is choosing what communication methods and why. Measure the awareness and appeal of other communication mechanisms and when it might be more appropriate to use them. An example would be to measure the effectiveness and acceptability of the Internet as a primary mode of communication with CalSTRS.

3 Service Credit Support Unit (Billings)

Measure the effectiveness of information that CalSTRS provides the customer with respect to purchasing additional service credit. Determine if the customer understands the different ways to buy service credit and the reasons to buy.

Based on the level of customer understanding of the billing process and purchase options, this will help the Service Credit Support Unit identify alternate distribution and purchase mechanisms.

Provide information about the service level of the Billings area response to member queries; determine what the members view as acceptable service levels.

Elicit ideas from the members regarding how billing information can be improved.

4 Regional Counseling Services (RCS)

Identify and report members' wants, needs and expectations of the RCS continuum of services. For example, customer satisfaction with the individual interview process and the content received from the interview.

RCS will use this information to modify substantive content (if needed), readjust RCS service delivery priorities, and reallocate resources to meet the members' priorities in an efficient and timely manner.

Identify preferred customer communication alternatives.

5 Health Benefits

VOTC will help evaluate existing and identify new feedback points within the process, together with the audience(s) and measures of effectiveness for each. As a result, Health Benefits will identify specific informational needs of members, caretakers, holders of power of attorneys, employers, and others.

Feedback from VOTC mechanisms will provide data to ensure service meets changing customer needs.

VOTC will also provide consistent groups(s) for further study. These could be groups of districts or members.

VOTC will help determine how well employers understand the Medicare Premium Payment Program and provide trend analysis that may suggest better ways to communicate with this special group.

Elicit program ideas from the customer for new health benefits that could be provided, or new needs within existing benefit plans.

6 Public Affairs

Measure the effectiveness of publications and forms to identify whether information given to the customer is clear, timely, useful and accurate.

Identify who reads publications and why.

Help determine the most effective form of communication with the customer. Ask customers, 'what is the preferred way to receive information? Is there a better way?'

Determine what information is desired or required at specific points in a customer's career.

Determine how employers use publications and forms.

Determine how effective employers are as access points when passing information through to their employees and customers.

7 Service Retirement

The VOTC will help the Service Retirement Division identify and align performance objectives with customer expectations. It will provide an ongoing source of feedback to allow the Service Retirement Division to tailor its processes to assist the customer in making the most informed, beneficial decision for their future.

Ongoing objective and subjective performance results on key areas for SR and Benefit Adjustments.

Provide information to help measure the effectiveness, timeliness and customer satisfaction of current processes, such as the Service Retirement or Refund Application process and the Problem resolution process.

Provide feedback on Program material distribution and its effectiveness.

Provide feedback as to the most successful behavioral traits of staff to assist in training and performance issues.

Determine customer confidence in Service Retirements staff competence and ability to help.

Determine if the constituent supported legislative initiatives reflect the needs and wants of the majority of our members or benefit recipients.

8 Disability

The VOTC will help the Disability Division identify and align performance objectives with customer expectations. It will provide an ongoing source of feedback to allow the Disability Division to tailor its processes to assist the customer in making the most informed, beneficial decision for their future.

Provide feedback on Program material distribution and its effectiveness. Thus measuring the effectiveness of current communication mechanisms and the timeliness of current processes.

Provide feedback as to the most successful behavioral traits of staff to assist in training and performance issues.

Verify if Disability Services exhibits appropriate behavioral traits and level of concern towards the customer.

Raise and measure the customer understanding of the disability benefits program that CalSTRS provides. Specifically, determine if employers and members understand the eligibility requirements of the program.

Determine customer confidence in Disability Staff competence and ability to help.

9 Survivor Benefits

VOTC system must collect and summarize ongoing customer feedback. A survey could be used to assess the customer's satisfaction after a specific point of service from a SB caseworker.

It should assist in determining customer satisfaction with the current processes, which will help Survivor Benefits identify potential issues that could benefit from a process improvement analysis.

The VOTC system must help determine the effectiveness of a caseworker use of the telephone in their daily interactions with the family members.

The VOTC feedback must include specifics on the "behavioral traits" of the SB caseworkers as they interact with family members during this stressful time in their lives. Verify if Survivor Benefits staff exhibits appropriate behavioral traits and level of concern towards the customer.

The VOTC feedback should determine what are the members' expectations of CalSTRS at the time of death of the member.

10 Membership

Evaluate Memberships performance and service to the customers (e.g. employers, members, California Teachers Association etc.), and ensure they are providing for the customers wants and needs, such as:

- Determine member wants and needs regarding the Annual Statement.
- Confirm that media reports are processed in an accurate and timely manner.

Determine if there is a timely response to customer questions, problems and other interactions.

This information will help Membership identify ideas for improvement, together with measurable indicators of success as they relate to the program and process improvement plan.

Collect and evaluate feedback from employer and other workshops.

Identify the most common exception types on reported data within the START system.

Provide feedback on Program material distribution and its effectiveness.

Elicit from employers and employees, ideas for effective communication between themselves and Membership.

Verify if Membership staff exhibits appropriate behavioral traits and level of concern towards the customer.

Membership needs to determine how their turnaround time on issues raised by other departments impacts the customers.

11 Financial Education Program (FEP)

Assess the satisfaction of FEP Web seminar attendees.

Survey former seminar attendees and prospective members to determine better ways to deliver information to members.

Determine the type of information members require to make decisions regarding their pension plan.

Ultimately, the FEP needs to know the financial awareness of the members. This would involve aggregating all of the above information into a report that will help measure that awareness.

12 Audits Program

Using the VOTC data or adding to the VOTC database, the Office of Audits can accomplish the following:

Determine the current level of member understanding of the School Districts audit process.

Receive feedback on the effectiveness of the current method of communicating the audit process to the customers.

Identify when would be the most appropriate time to audit a member in relation to their retirement date.

Evaluate the communication process between the Membership, Service Retirement, Legal and Office of Audits divisions and the School districts and determine how it can be improved.

Analysis of the current point of service questionnaires received from the school districts:

- Regarding application of the law

- Regarding the audit process

- Regarding the audit reports

13 Client Outreach Program

Capture and report feedback from employees and employers on Cash Balance and Voluntary Investment Program presentations. Feedback should include the audiences desire to see CalSTRS representation at events that are not currently attended by CalSTRS.

Capture and report feedback regarding Voluntary Investment Program's marketing material. Information should include the effectiveness of the material in motivating the customer to take action and their response to the material content.

14 Cash Balance & Voluntary Investment Program

Identify and align performance targets with customers' wants, needs and expectations. e.g. What is a realistic time frame for the Benefit payment or how soon should they receive a response to an inquiry?

Show what currently works well and what does not according to the customer.

Through trend analysis, it will help align Cash Balance & VIP targets with those of the rest of department & other program areas, thereby providing a consistent approach to customer service.

The data provided by the VOTC will aid with ideas to improve the CB & VIP program.

Provide measurable indicators of success.

Provide feedback on customer (both employers and participants) satisfaction on the entire lifecycle of the programs e.g. benefits process, implementation process.

- Capture and report feedback from both employees and employers on training and information sessions they have attended.
- Provide feedback on the reporting process, with the focus on individual employers.
- Provide feedback on benefit process & how satisfied customers are with the interaction.

Provide feedback on program material distribution and its effectiveness.

Provide CB & VIP Programs with feedback on satisfaction of third party administrator and other CalSTRS and Cash Balance related contacts e.g. the Public Service Office, Information Technology Services Division, and Accounting etc.

15 Accounting

Collect point of service data to determine customer satisfaction with account services such as the payment process, collecting receivables, and distributing tax information. The information collected should include ideas and suggestions from the customer on how these processes may be improved, and new more effective ways of providing service.

The information collected may be used to define better, more useable reports to monitor processes against performance targets and to help management prioritize improvement projects.

16 Executive

VOTC should help identify and provide management with timely and accurate information on customer satisfaction on the different program areas within the department. This will create an overall “temperature” check for management. The information will monitor the immediate concerns of the member but also provide information on what the department is doing right. It may help to pin point any trends or large-scale program area problems and the need for additional communication efforts that may ultimately help direct resources/attention to “critical” areas.

Many issues are communicated through controlled correspondence, but it is unknown how wide spread issues can be. Feedback from customers can provide effectiveness of changes, and provide a window into the “big picture” of the overall customer satisfaction.

17 Ombudsman

Determine how satisfied the customers are with the final resolution of problem cases.

It will help with the implementation of focus groups with the Employer Institute and develop a standard evaluation form for conferences and workshops, specific to Ombudsman.

It must provide an easy to use repository for customer information that Ombudsman receives.

18 Office of Program Support Services (OPSS)

Determine from the customers the ease of use and clarity of the different forms used within OPSS e.g. EFT forms, Tax forms, Death Beneficiary forms.

Determine if members' prefer to transact OPSS business such as establishing or changing an address, beneficiary or tax preference by using the telephone, mail, Internet or fax.

Determine the timeliness and accuracy of the responses provided by OPSS on business conducted, such as Change of Address and Beneficiary updates.

Provide feedback on the timeliness and accuracy of OPSS response to requests for Program material.

Verify that staff's demeanor in dealing with clients is professional, appropriate and sensitive to the individuals and their issues.

19 Legislative Office

Determine if customers have sufficient access to legislative information e.g. the Bulletin, Legislative Alert, RCS, Counselors, and the web.

Determine if customers have sufficient knowledge of upcoming legislative changes to make informed retirement decisions when they are close to retirement.

For members affected by changes in legislation, how satisfied are they with:

- The implementation
- The way they were affected
- The information they received about the legislation
- The timeliness of the information they received

Req. No	Survey Group	Business Requirement	Global Satis Surv.	Targ Satis Surv.	Cust Need Asmt.	Point Serv Qust.	Focus Group	Web Enabl Collect	Qust of the Mnth.	Tele Data Coll.	One/ One Inter.	Other
PSO01	Service Level	Align performance target with customers' wants, needs and expectations eg. Appropriate Service Levels, term definition.	X	X	X	X	X	X				
PSO02	Assess Process	Identify which current business processes work well and which do not.	X	X	X	X	X	X				
PSO03	Effective Comm.	Determine whether PSO answers all questions to the satisfaction of customer. Are the answers complete, accurate and consistent		X	X	X	X					
PSO04	Quick Hit	Identify common reasons for customer contact.	X		X			X				
PSO05	Effective Comm.	Determine who is choosing what communication methods and why.	X	X			X	X	X			
PSO06	Effective Comm.	Measure the effectiveness and appeal of other communication mechanisms (eg. Internet) and when it may be appropriate to use them.										
SCS01	Effective Comm.	Measure the effectiveness of information that CalSTRS provides the customer with respect to purchasing additional service credit. Determine if the customer understands the different ways to buy service credit and the reasons to buy.	X	X	X	X	X	X	X		X	
SCS02	Effective Comm.	Determine the level of customer understanding of the billing process and purchase options.	X	X	X	X		X			X	
SCS03	Service Level	Provide information about the service level of the Billings area response to member queries; determine what the members view as acceptable service levels.	X	X	X	X		X	X		X	
SCS04	Assess Process	Elicit ideas from the members regarding how billing information can be improved.	X	X	X	X		X	X		X	
RCS01	C N A	Identify and report member's wants, needs and expectations of the RCS continuum of services eg. Customer satisfaction with the individual interview process and content.	X	X	X	X	X	X	X			
RCS02	Effective Comm.	Identify preferred customer communication alternatives.	X	X	X	X	X	X	X			

Req. No	Survey Group	Business Requirement	Global Satis Surv.	Targ Satis Surv.	Cust Need Asmt.	Point Serv Qust.	Focus Group	Web Enabl Collect	Qust of the Mnth.	Tele Data Coll.	One/ One Inter.	Other
HBN01	Assess Process	Evaluate and identify, existing and new feedback points with the process.	X	X	X	X	X	X	X		X	
HBN02		Determine the audience and measures of effectiveness for each of the process points identified.	X	X	X	X	X	X		X	X	
HBN03		Provide consistent groups for further study, these will be groups of districts or members.		X			X	X		X		
HBN04	Quick Hit	Determine how well employers understand the Medicare Premium Payment Program.	X					X				
HBN05	Quick Hit	Provide trend analysis of the feedback of the Medicare Premium Payment Program. (May suggest better ways to communicate with this special group.)	Goes with other									
HBN06	C N A	Elicit program ideas from customers for the new health benefits, or new needs within existing benefits.	X	X	X		X	X	X			
HBN07	Effective Comm.	Determine how to contact and communicate with Caretakers, Power of Attorney, etc.	X		X			X				
PAO01	Published Material	Measure the effectiveness of publications and forms to identify whether information given to the customer is clear, timely, useful and accurate.	X	X	X		X	X				
PAO02	Published Material	Identify who reads publications and why?	X	X	X		X					
PAO03	Effective Comm.	Determine the most effective form of communication with the customer. 'What is the best way to receive information?' Is there a better way?		X	X		X	X				
PAO04	Effective Comm.	Determine what information is desired or required at specific points in a customers career.		X	X		X	X				
PAO05	Published Material	Determine how employers use publications and forms		X	X		X	X				
PAO06	Effective Comm.	Determine how effective employers are as access points when passing information through to their employees and customers.		X	X		X	X				
SR01	Analyze Feedback	Provide ongoing objective and subjective performance results on key areas for SR and Benefit Adjustments.	X	X	X	X	X	X	X	X		

Req. No	Survey Group	Business Requirement	Global Satis Surv.	Targ Satis Surv.	Cust Need Asmt.	Point Serv Qust.	Focus Group	Web Enabl Collect	Qust of the Mnth.	Tele Data Coll.	One/ One Inter.	Other
SR02	Assess Process	Provide information to help measure the effectiveness, timeliness and customer satisfaction of current processes, such as the Service Retirement or Refund Application process and the Problem Resolution process.	X	X	X	X		X	X	X		
SR03	Published Material	Provide feedback on program material distribution and its effectiveness.	X	X	X	X	X	X	X	X		
SR04	Behavioral Traits	Provide feedback as to the most successful behavioral traits of staff to assist in training and performance issues.		X		X		X	X	X		
SR05	Service Level	Determine customer confidence in Service Retirements staff competence and ability to help.		X		X		X	X	X		
SR06	C N A	Determine if the constituent supported legislative initiatives reflect the needs and wants of the majority of our members or benefit recipients.		X	X	X		X	X			
DA01	Published Material	Provide feedback on program material distribution and its effectiveness.	X	X		X	X	X		X	X	
DA02	Behavioral Traits	Provide feedback as to the most successful behavioral traits of staff to assist in training and performance issues.		X		X	X	X		X	X	
DA03	Behavioral Traits	Verify if Disability Services exhibits appropriate behavioral traits and level of concern towards the customer.		X		X	X	X	X	X	X	
DA04	Quick Hit	Measure the customer understanding of the disability benefits program eg. Do employers and members understand the eligibility requirements of the program?	X	X		X	X	X		X	X	
DA05	Service Level	VOTC must help measure the level of customer confidence in CalSTRS' competence and ability to help.	X	X		X	X	X	X	X	X	
SB01	Analyze Feedback	Collect and summarize ongoing customer feedback e.g assess customer satisfaction after specific points of service from an SB caseworker.				X		X				
SB02	Assess Process	Determine customer satisfaction with current processes.		X		X		X				

Req. No	Survey Group	Business Requirement	Global Satis Surv.	Targ Satis Surv.	Cust Need Asmt.	Point Serv Qust.	Focus Group	Web Enabl Collect	Qust of the Mnth.	Tele Data Coll.	One/ One Inter.	Other
SB03	Service Level	Determine the effectiveness of a caseworkers use of the telephone in their daily interactions with the family members.				X				X		
SB04	Behavioral Traits	Verify if Survivor Benefits exhibits appropriate behavioral traits and level of concern towards the customer during this stressful time of their lives.		X		X		X				
SB05	Service Level	Determine what are the members expectations of CalSTRS at the time of death of the member.			X			X				
MBR01	Service Level	Evaluate Memberships performance and service to the customers. Ensure they are providing for the members wants and needs such as those specific to Annual Statement and if the media reports are processed in an accurate and timely manner.	X	X	X	X	X	X	X	X	X	
MBR02	Service Level	Determine if there is a timely response to customer questions, problems and other interactions.		X	X	X	X	X	X	X		
MBR03	Assess Process Quick Hit	Collect and evaluate feedback from employer and other workshops.		X	X	X	X	X		X	X	
MBR04	Quick Hit	Identify the most common exception types on reported data within the START system.					X					
MBR05	Published Material	Provide feedback on Program material distribution and its effectiveness.	X	X	X	X	X	X	X	X	X	
MBR06	Effective Comm.	Elicit from employers and employees, ideas for effective communication between themselves and Membership.		X	X	X	X	X	X	X	X	
MBR07	Behavioral Traits	Verify if Membership staff exhibits appropriate behavioral traits and level of concern towards the customer.				X	X			X	X	
FEP01	Quick Hit	Asses the satisfaction of FEP Web Seminar attendees.		X		X		X				
FEP02	Effective Comm.	Survey former seminar attendees and prospective members to determine better ways to deliver information to members		X	X			X				
FEP03	Effective Comm.	Determine the type of information members require to make decisions regarding their pension plan.			X		X	X	X	X	X	

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AUD01	Effective Comm.	Determine the current level of member understanding of the School Districts audit process.	X	X				X				
AUD02	Assess Process	Receive feedback on the effectiveness of communicating the audit process to the customers.	X	X				X				
AUD03	Assess Process	Identify when would be the most appropriate time to audit a member in relation to their retirement date.	X	X				X				
AUD04	Effective Comm.	Evaluate the communication process between the Membership, Service Retirement, Legal and Office of Audits divisions and the School districts and determine how it can be improved.			X		X					
AUD05	Analyze Feedback	Analysis of the current point of service questionnaires received from the school districts regarding; application of the law, the audit process and the audit reports.	X	X								
COP01	Effective Comm. Quick Hit	Capture and report on feedback from employers and employees on Cash Balance and Voluntary Investment Program presentations.		X		X						
COP02	C N A	Determine audience desire to see CalSTRS representation at events that are not currently attended by CalSTRS.		X		X		X	X			
COP03	Published Material	Capture and report feedback in Voluntary Investment Programs marketing material. Include the effective of the material in motivating the customer to take action, and their response to the material content.	X	X	X	X	X	X	X	X	X	
CBP01	Service Level	Identify customers' wants, needs and expectations eg. What is a realistic time frame for the Benefit payment, or how soon should they receive a response to an inquiry.	X	X	X							
CBP02	Assess Process	Show what currently works well and what does not according to the customer.	X	X		X	X		X	X		
CBP03	Service Level	Provide measurable indicators of success.	X	X		X				X		

Req. No	Survey Group	Business Requirement	Global Satis Surv.	Targ Satis Surv.	Cust Need Asmt.	Point Serv Qust.	Focus Group	Web Enabl Collect	Qust of the Mnth.	Tele Data Coll.	One/ One Inter.	Other
CBP04		Provide feedback on customer (employer and participants) satisfaction on the entire lifecycle of the programs e.g. benefits process, implementation process.	X	X		X				X		
CBP05	Quick Hit	Capture and report feedback on training and information sessions they have attended.	X	X		X	X					
CBP06	Assess Process	Provide feedback on the reporting process, with the focus on individual employers.	X	X			X			X		
CBP07	Assess Process	Provide feedback on benefit process and how satisfied customers are with the interaction.	X	X						X		
CBP08	Published Material	Provide feedback on program material distribution and its effectiveness.		X		X	X					
CBP09		Provide feedback on satisfaction of third party administrators and other CalSTRS and Cash Balance related contacts (PSO, ITSD and Accounting etc.)	X	X		X				X		
ACC01	Assess Process	Collect point of service data to determine customer satisfaction with account services such as the payment process, collecting receivables and distribution tax information.		X	X	X			X	X		
ACC02	Assess Process	The information collected should include suggestions from the customer on how these processes may be improved and new more effective ways of providing service.		X	X	X				X		
EXC01	Service Level	VOTC must provide management with timely and accurate information on customer satisfaction on the different program areas within the department.	X	X			X		X			
EXC02	Service Level	Determiner the immediate concerns of the member but also provide information on what the department is doing right.	X	X	X		X	X	X	X		
OMB01	Service Level	Determine how satisfied customers are with the financial resolution of problem cases.		X		X						

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OMB02		Help with the implementation of focus groups with the Employer Institute and develop a standard evaluation form for conferences and workshops, specific to Ombudsman.					X					
OMB03		Provide a repository for customer information that Ombudsman receives.										X
OPSS01	Published Material	Determine from the customers the ease of use and clarity of the different forms used within OPSS e.g. EFT forms, Tax forms, Death Beneficiary forms.	X			X				X		
OPSS02	Effective Comm.	Determine if members' prefer to transact OPSS business such as establishing or changing an address, beneficiary or tax preference by using the telephone, mail, Internet or fax.			X		X	X	X	X		
OPSS03	Service Level	Determine the timeliness and accuracy of the responses provided by OPSS on business conducted, such as Change of Address and Beneficiary updates.	X			X				X		
OPSS04	Behavioral Traits	Provide feedback on the timeliness and accuracy of OPSS response to requests for Program material.	X			X				X		
OPSS05	Published Material	Verify that staff's demeanor in dealing with clients is professional, appropriate and sensitive to the individuals and their issues.	X			X				X		
LEG01	Eff Comm. Pub Mat.	Determine if customers have sufficient access to legislative information e.g. the Bulletin, Legislative Alert, RCS, Counselors, and the web.	X		X				X	X		
LEG02	Eff Comm.	Determine if customers have sufficient knowledge of upcoming legislative changes to make informed retirement decisions when they are close to retirement.		X	X	X				X		
LEG03	Eff. Process	For members affected by changes in legislation, how satisfied are they with: The implementation, the way they were affected, the information they received and the timeliness of that information.		X		X						